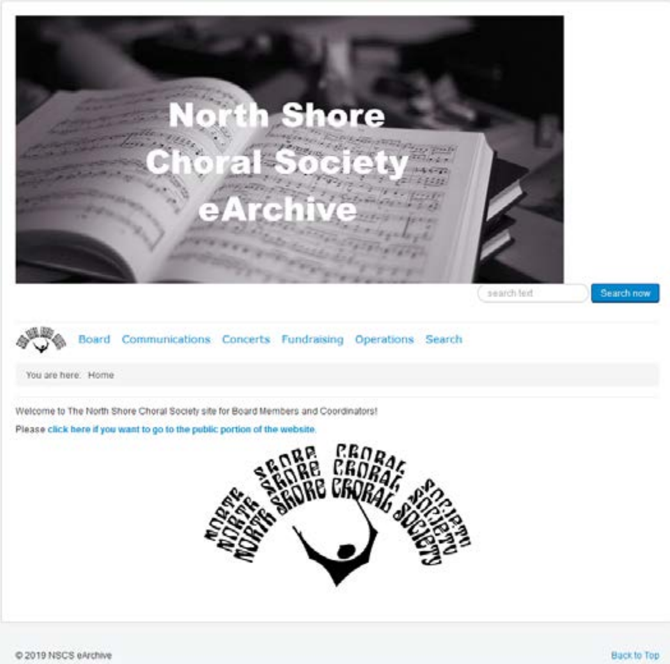
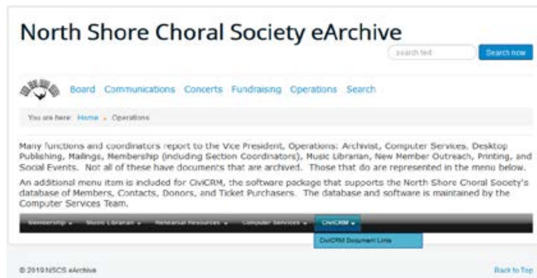
<table>
<tr><th>Illustrations: Joomla front end</th><th>Notes</th></tr>
<tr><td colspan="2">The NSCSCRM Relationship Management website is now part of the NSCS eArchive website located at https://nscscrm.northshorechoral.us/</td></tr>
<tr><td>



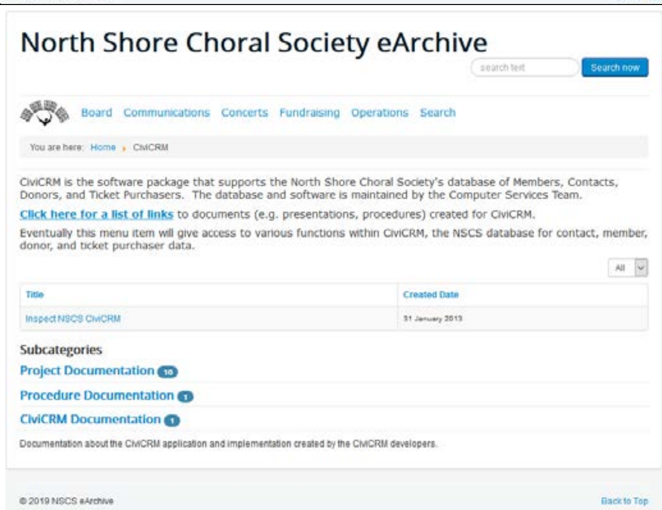
</td><td>

1. This is the Home page.

One way to get to the CiviCRM backend administration screens is to click on the Operations menu.



</td></tr>
<tr><td>



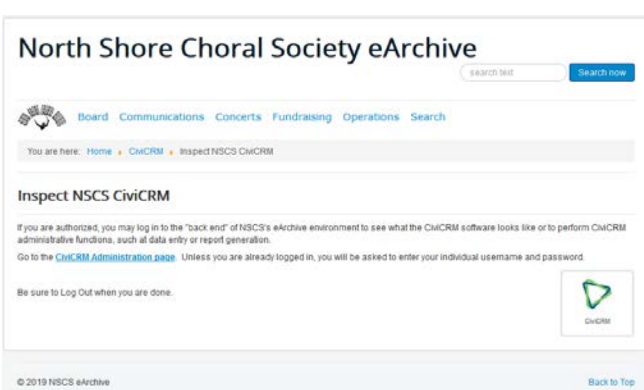
</td><td>

2. This is the CiviCRM documentation page, a “work in progress” as part of the eArchive project.

CiviCRM Project and procedure documentation will be available via links on this page.

Select the Inspect NSCS CiviCRM link in the middle of the screen.

</td></tr>
<tr><td>



</td><td>

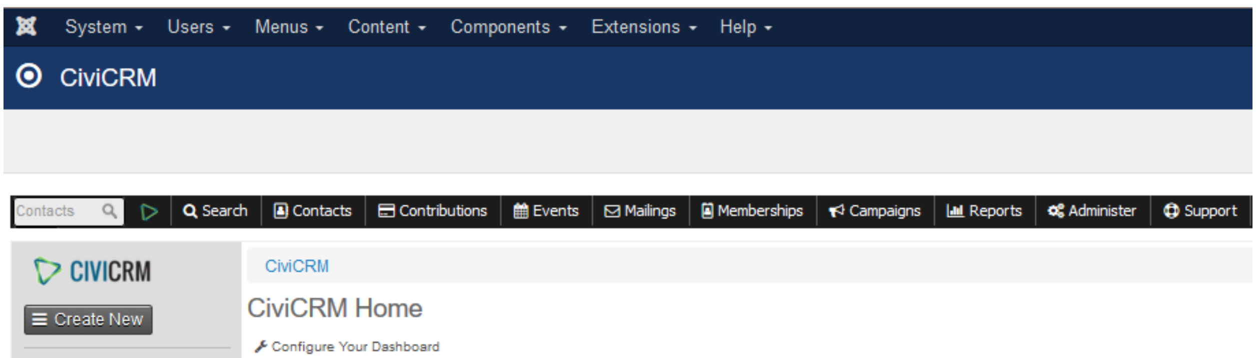
3. This is the Inspect NSCS CiviCRM article page.

Click on the link text or the CiviCRM icon to get to the login screen.

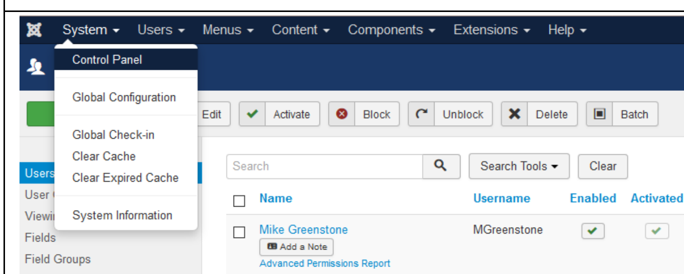
You can also access the CiviCRM admin site directly through this URL (without going through the eArchive):

https://bit.ly/nscscivi

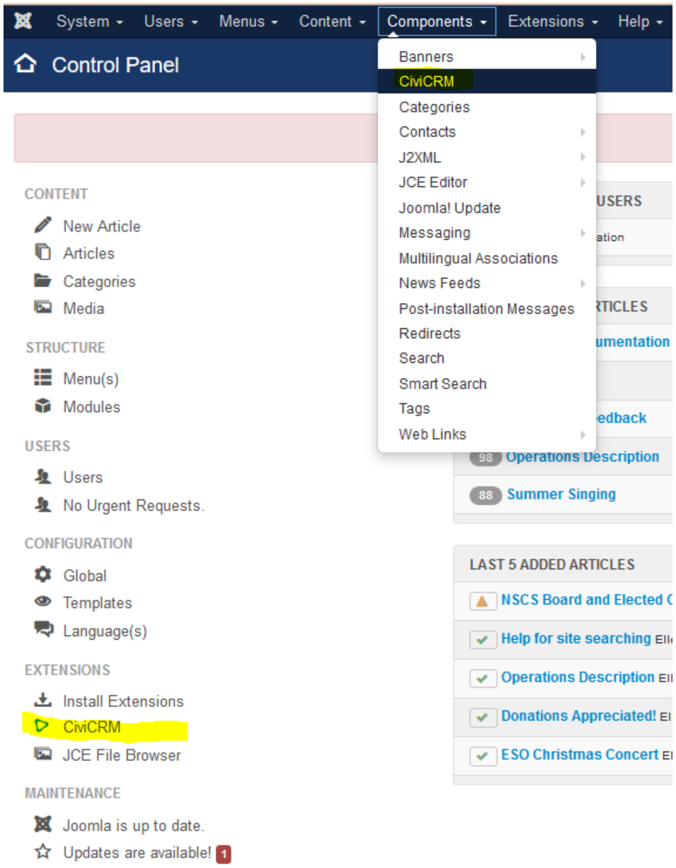
</td></tr>
</table>

<table>
<tr><th>Illustrations: Joomla front end</th><th>Notes</th></tr>
<tr><td>
</td><td>4. Enter your individual username and password, and click Log in.</td></tr>
<tr><td colspan="2">The CiviCRM procedure illustrations assume you have been successful in logging in to the CiviCRM backend component of the NSCS eArchive Joomla website.


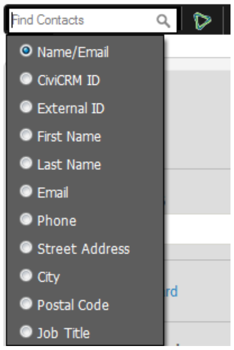
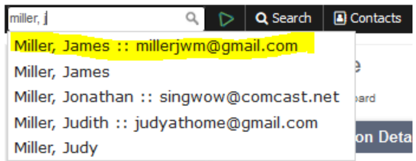
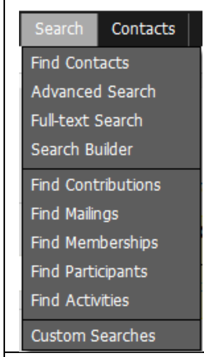
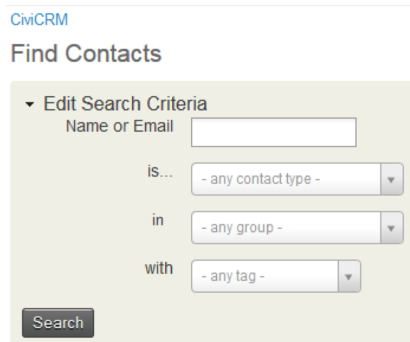
The menu at the very top of the window is the Joomla menu; this is used to maintain the entire eArchive website.

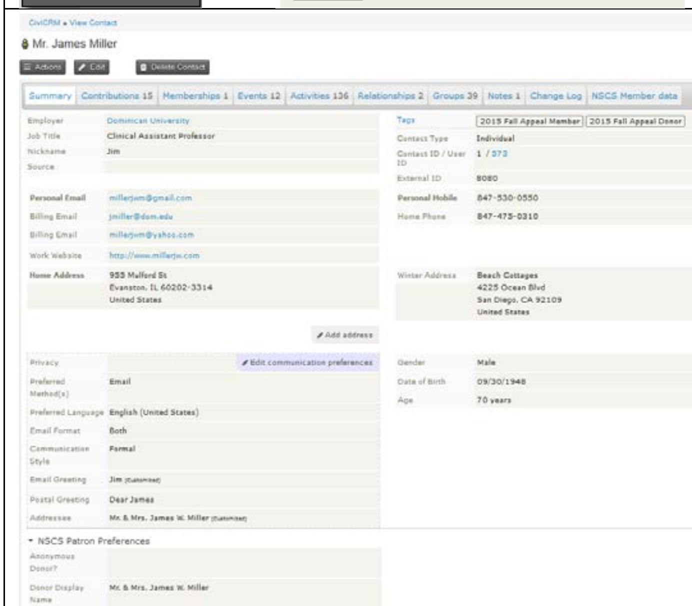
The menu line with the Contact Search option on the left is used for CiviCRM. This is the one used for all CiviCRM data entry, maintenance, and report/file generation.</td></tr>
<tr><td>
</td><td>5. If you select a Joomla menu item, you can return to the CiviCRM component in several ways.

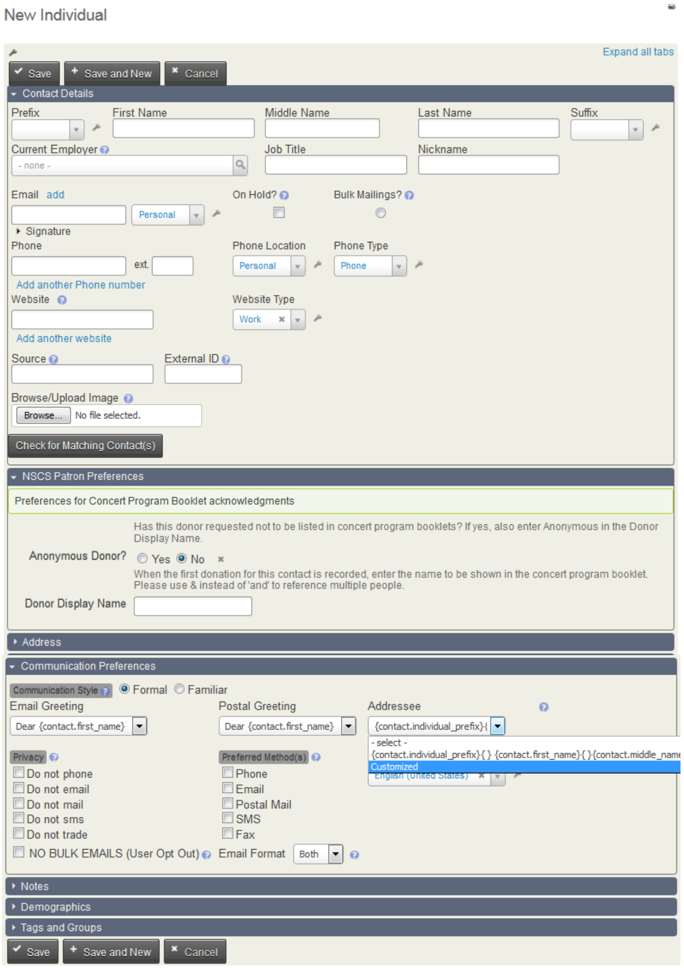
One way is via the Joomla Control Panel.</td></tr>
</table>

Illustrations: Joomla front end	Notes
	6. On the **Control Panel**, you can access CiviCRM either by the link in the components menu Or by the link under Extensions in the left hand column. Single-click to access **CiviCRM**. If you login to Joomla via the eArchive administrator link, https://nscscrm.northshorechoral.us/administrator/index.php you will see the **Control Panel**.

Illustrations: CiviCRM administration	Notes
The CiviCRM procedure illustrations assume you are logged in to the **Joomla** back end (administrator functions) and are accessing the **CiviCRM** component.	
	This is the **CiviCRM Home** page. Note: You can use the link to configure your own Dashboard. It might be useful to include a Contribution report and an Events report that shows Concert Tickets Purchased. That way you can quickly verify the latest entries.

<table>
<tr><th>Illustrations: CiviCRM (Contacts)</th><th>Notes</th></tr>
<tr><td>


</td>
<td>Contact Searches
1. There are multiple ways to search for a contact to initiate an update for that contact's info, or for other data related to that contact (contributions, ticket purchases, membership info)

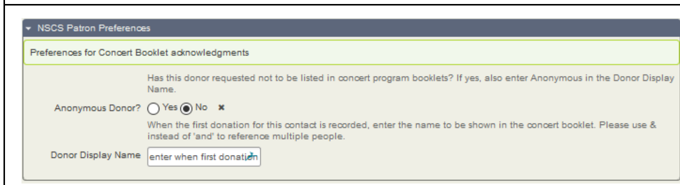
The easiest is to type
Last Name, Firstname
in the Search box.
Multiple choices may be displayed. If so, pick the closest match and make sure you've got the right one by checking other info (address, phone, etc.)</td></tr>
<tr><td></td>
<td>Contact Data Update
2. To update info for a specific contact already in CiviCRM, start with the View Contact screen.
Mouse over specific sections (email, phone, address, communication preferences, etc.) for the option to update just that data.
The NSCS Member data tab has data only captured for members.
The External ID field is the NSCS dBase ID (pre-CiviCRM).
When an individual dies, we set the Is Deceased indicator (in the Demographics section) and turn off communications (in the Communications Preferences section) rather than deleting that person's record. This allows us to maintain referential integrity within the database.</td></tr>
</table>

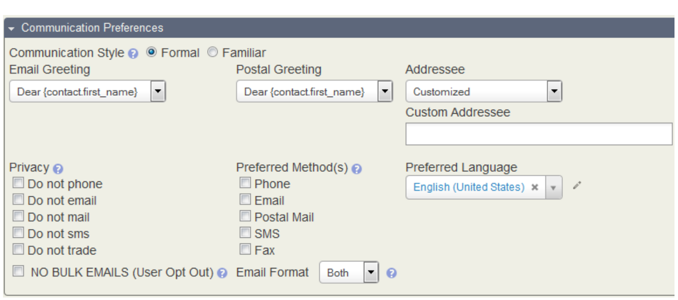
<table>
<tr><th>Illustrations: CiviCRM (Contacts)</th><th>Notes</th></tr>
<tr><td>


</td><td>3. The screen to enter data for a New Individual looks different.

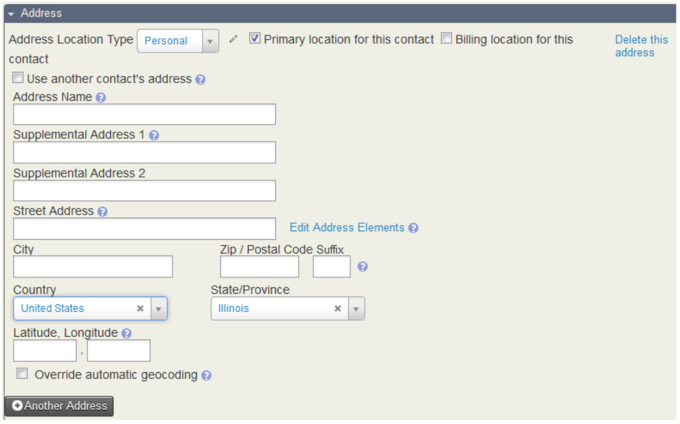
The Notes section can be used to record explanations when there are multiple email or phone numbers entered, particularly when more than one person is involved. CiviCRM intends that and Individual record represent just one person. However, instead of creating Households and linking Individuals, we are using the Custom Addressee (in Communication Preferences) to contain names of couples to be used for addressing envelopes.

Use & instead of “ and ” in the Custom Addressee field.

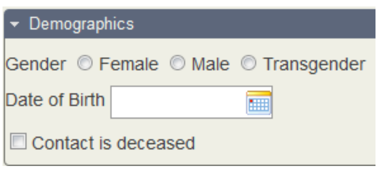
If an email “bounces”, mark it as On Hold? rather than deleting it, unless notified that the contact is no longer using that account.</td></tr>
<tr><td>


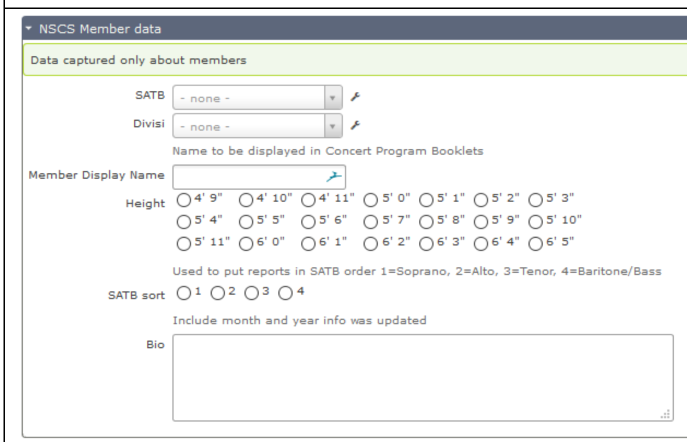
</td><td>4. Use the Patron Preferences section used to enter preferences the first time a contribution is received from a contact.</td></tr>
<tr><td>


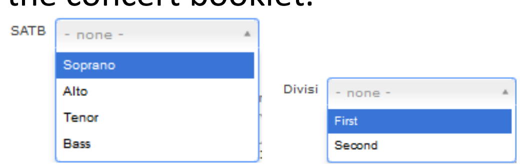
</td><td>5. The Privacy fields distinguish between different types of communication methods.
Do not mail corresponds to the dBase MAILING = FALSE.
The Opt Out (unsubscribe) for bulk emails is recorded here.</td></tr>
</table>

<table>
<tr><th>Illustrations: CiviCRM (Contacts)</th><th>Notes</th></tr>
<tr><td>


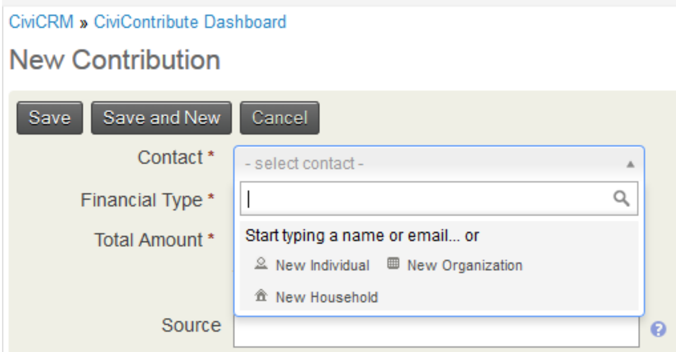
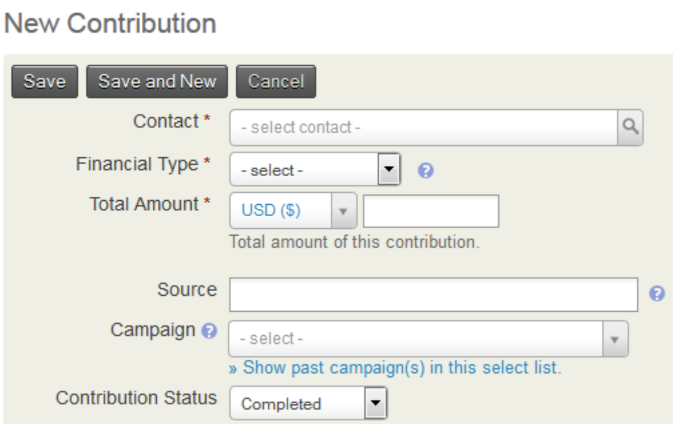
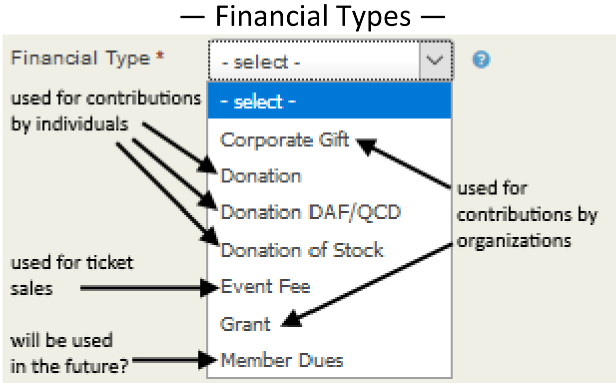
</td><td>
6. CiviCRM can record multiple addresses for a contact. Addresses are identified as “Billing” when the only way we know about them is from a PayPal transaction.

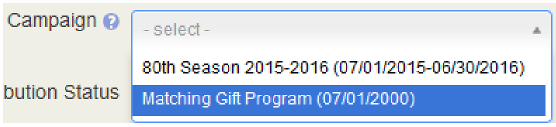
PO BOX info must be entered in Supplemental Address 1, (or Supplemental Address 2 if Supplemental Address 1 is being used for something else) not Street Address.
</td></tr>
<tr><td>


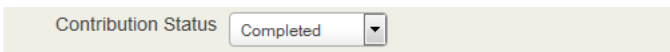
</td><td>
7. We don’t usually record Gender or Date of Birth data. The Contact is deceased is prominently displayed and selection logic may ask if you want to exclude deceased individuals. (We do have some, because we imported their donations/member info.)
</td></tr>
<tr><td>


</td><td>
8. NSCS Member data (far right tab on the View Contact screen) is used to enter voice part and height data. The Member Display Name shows the preferred name to be printed in the concert booklet.


</td></tr>
</table>

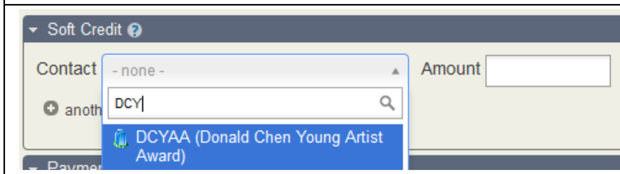
Illustrations: CiviCRM (Contributions)	Notes
	**New Contribution** 1. To enter a contribution, start with **Contact** selection. If the search for an individual or organization is unsuccessful, you can enter minimal information to establish a new contact, and follow Contact Data Update instructions (see previous pages) to add data after the contribution is entered. An asterisk * identifies required fields. NOTE: For first-time contributors, please be sure to enter a **Donor Display Name** for the contact (in the **NSCS Patron Preferences** section).
 — Financial Types — 	2. After selecting or creating a contact, select the appropriate **Financial Type** (usually *Donation* for individual contributions) and enter the **Total Amount**. For **Source**, specify how Computer Services was first informed of this contribution (usually *NSCS (Karen Rigotti) email* or *John Darrow email* or *Nancy Slichenmyer email*, but sometimes *PayPal*). However, for *Donation DAF/QCD* put the Fund/Account name in **Source**. (e.g., *Schwab Donor Advised Fund*, *TD Ameritrade*).

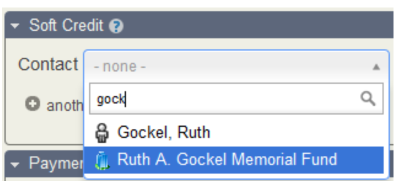
<table>
<tr><th>Illustrations: CiviCRM (Contributions)</th><th>Notes</th></tr>
<tr><td>


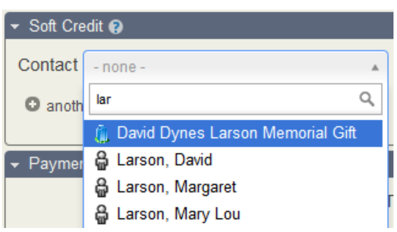


</td><td>
3. If this is a matching gift (either an individual’s gift that will be matched or a corporate gift that is the match), select the Matching Gift Program campaign.

Otherwise, you can select the current season as the Campaign.

Let the Contribution Status default to Completed.
</td></tr>
<tr><td>






</td><td>
4. If all or a portion of a gift is to be allocated to a Designated Use Fund (DCYAA, Larson, or Gockel), use the Soft Credit section to specify this.

Each of these funds has been defined as an Organization, so just start typing one of those three in the Contact search field and select it when it is displayed.

Put the amount to be allocated to the fund in the Amount field. (You don’t need to put in the dollar sign.) Specify a Type of Special Fund.

A soft credit of the type Household is entered to credit an NSCS Board member when contributions are recorded as given by the spouse of the Board member. (This happens only if both are members, and the one on the NSCS Board is not the one we use to record the household’s contributions.)
</td></tr>
</table>

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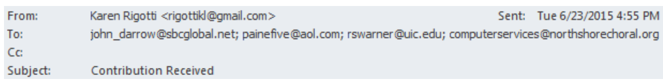
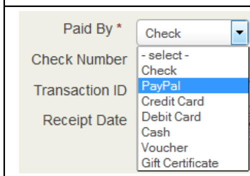
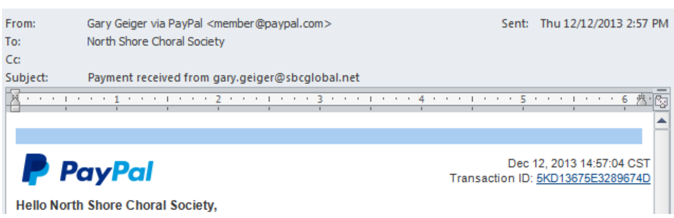
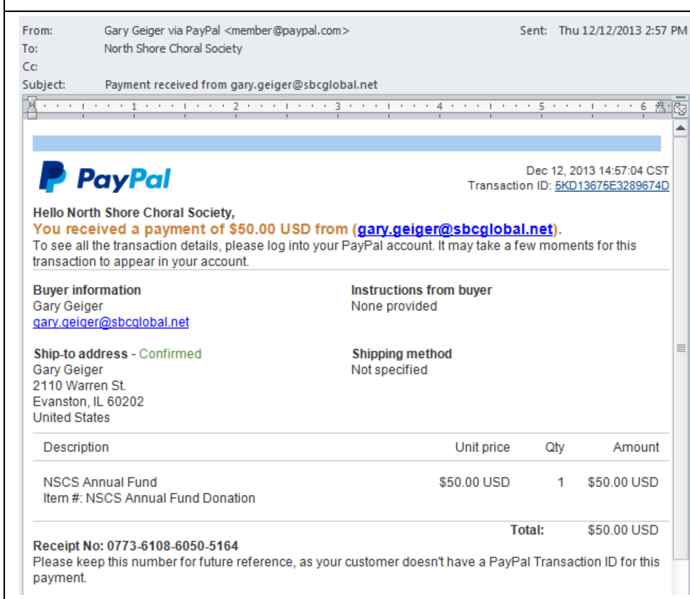
<tr><td>
</td><td>5. Within the Payment Details section, the Received date and Time fields should be the Sent date from the notification email, unless the date that NSCS took possession of the check or funds is specified in the body of the message. The postmarked date can be used, if that date is communicated. The Notes field can document which date was used.

Paid By is usually Check (default). We don't currently record the Check Number.</td></tr>
<tr><td>


</td><td>6. Occasionally we receive donations via PayPal; in that case, PayPal should be selected as the Paid By value, and the Transaction ID copied from the PayPal email.</td></tr>
<tr><td>
</td><td>7. For a PayPal transaction, there is sometimes a Receipt No.

Receipt No: 1901-9949-7446-5702

printed below the total line, with the text "Please keep this number for future reference, as your customer doesn't have a PayPal Transaction ID for this payment."

This line may be copied and pasted into the Notes field of the ▾ Additional Details tab.

(See #10 below.)</td></tr>
</table>

<table>
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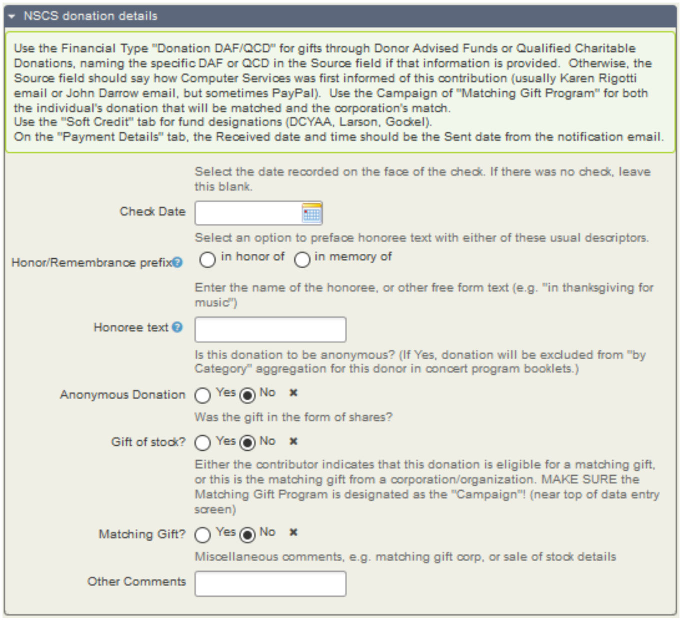
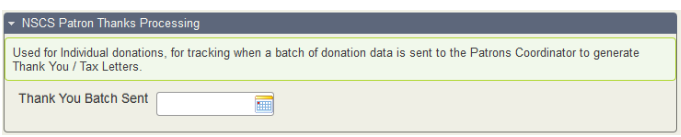
<tr><td>


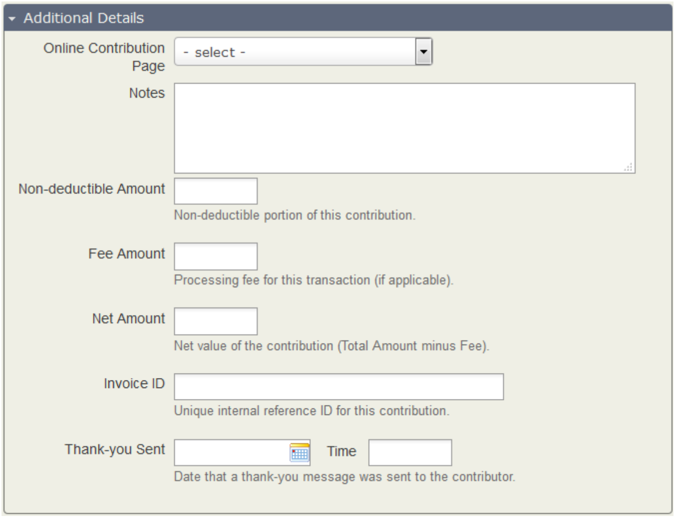
</td><td>
8. Other info specific to NSCS is entered in the NSCS Donation Details section. (There is some NSCS-specific Help text displayed at the beginning of this section.)

Although we don't record check number, we <u>do</u> record the date of the check, which is the date specified within notification emails.

Be sure to use & instead of "and" in the Honoree text field when multiple people are honored. (Patron & Concert Program Booklet Coordinator request)
</td></tr>
<tr><td>


</td><td>
9. The NSCS Patrons Thanks Processing tab is not updated when a contribution is received. The date recorded specifies when the batch containing this contribution was sent to the Patrons Coordinator. (This is the NSCS-specific version of the Thank-you Sent Date field in the Additional Details tab. It is usually updated via the "Batch Update for Contributions" action using the NSCS Thank You Letter Batch Update profile.)
</td></tr>
</table>

<table>
<tr><th>Illustrations: CiviCRM (Contributions)</th><th>Notes</th></tr>
<tr><td>



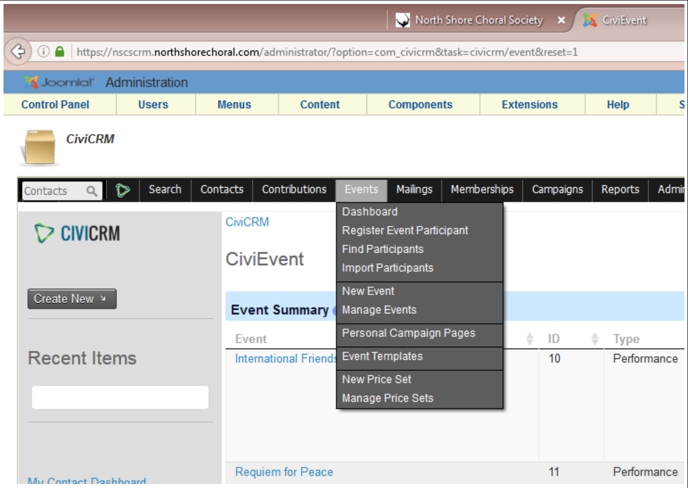
</td><td>

10. The **Additional Details** section contains CiviCRM fields that we might use some day; for now if we need a place to put the *PayPal Receipt Number*, that text and the number itself (1901-9949-7446-5702) can be recorded in the **Notes** field of this section.

</td></tr>
</table>

Illustrations: CiviCRM (Ticket Sales)	Notes

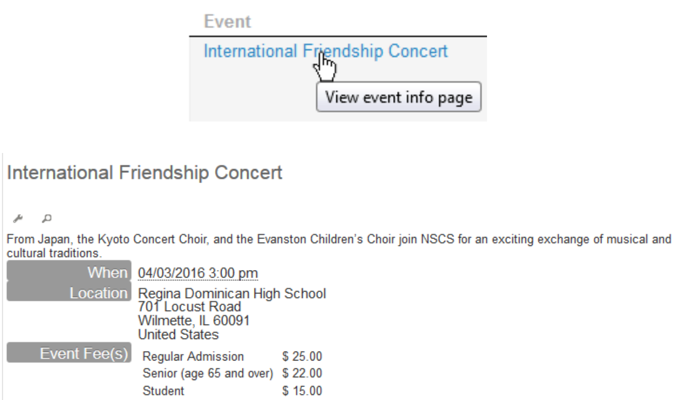
These illustrations assume you are logged in to the Joomla back end (administrator functions) and are accessing the CiviCRM component.



Prerequisites

A. A ticket purchase is related to an **Event**; purchases can be recorded via the "Register Event Participant" function in the Events menu. In addition to each concert, each NSCS season should be defined as an event, so that season ticket sales can be recorded.

To verify that appropriate Events have been created, review the **Dashboard** or the items listed on the **Manage Events** screen.



B. To verify that the event for which you want to record a ticket sale has been associated with a **Price Set** (which records types of tickets and their prices), view the **event info page** by clicking on the **Event** name. (The link is available on most screens where Event name is shown.)

More Background Information

An **Event Participant** record is created:

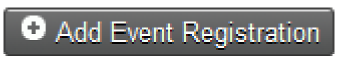
Status	Role
Ticket purchaser	Attendee
Registered	Singer, Chamber Choir

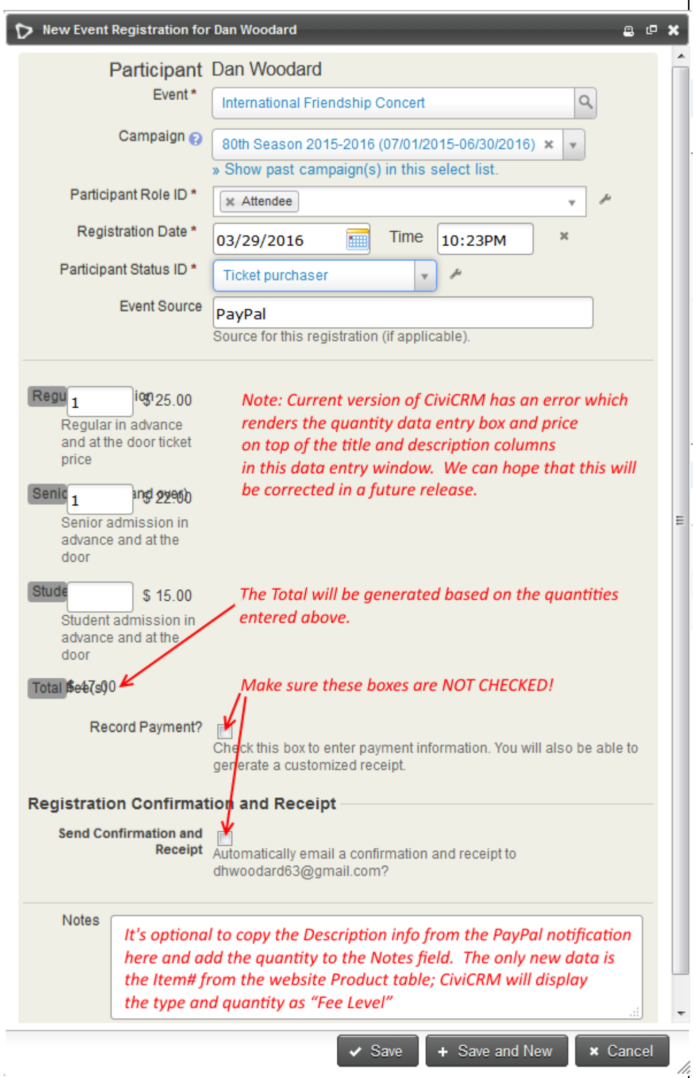
a) On behalf of the Tickets Coordinator, to record the purchase of season or concert tickets by a Contact.
The Participant's Role is **Attendee**.

b) On behalf of the Membership Coordinator, to register that an NSCS member will participate in a concert. The Participant's Role is **Singer**. (An additional Role can be added for **Chamber Choir**. **Soloist**, **Instrumentalist** roles are also enabled, but these are all "uncounted" roles on the Dashboard. "Counted" reflects only Registered Singers.)

Illustrations: CiviCRM (Ticket Sales)	Notes

Hint: Because a ticket sale represents a transaction relating a **Contact** and an **Event**, data entry can be initiated either via a “View Contact” screen or the “Register Event Participant” function from the Events menu. If the purchaser is *not* a name you recognize, the “View Contact” screen is the better option. This allows you to check the street address and email to verify that the purchaser is already in the database (or to add the Contact), or to change the first name if another household member is now ordering tickets.





If you don’t get a notification box that the registration has been saved, you may have neglected to enter a required (*) field.

1. *Ticket Purchase via PayPal*

• From the **View Contact** screen for the ticket purchaser, select the **Events** tab.

• Select “Add Event Registration”

• Select the **Event** (either the concert name or *NNth Season Tickets*). The associated **Campaign** (NSCS season) should automatically appear.

• Allow the **Participant Role ID** to default to ***Attendee***.

• Enter the PayPal transaction date and time on the PayPal notification email as the **Registration Date** and **Time**.

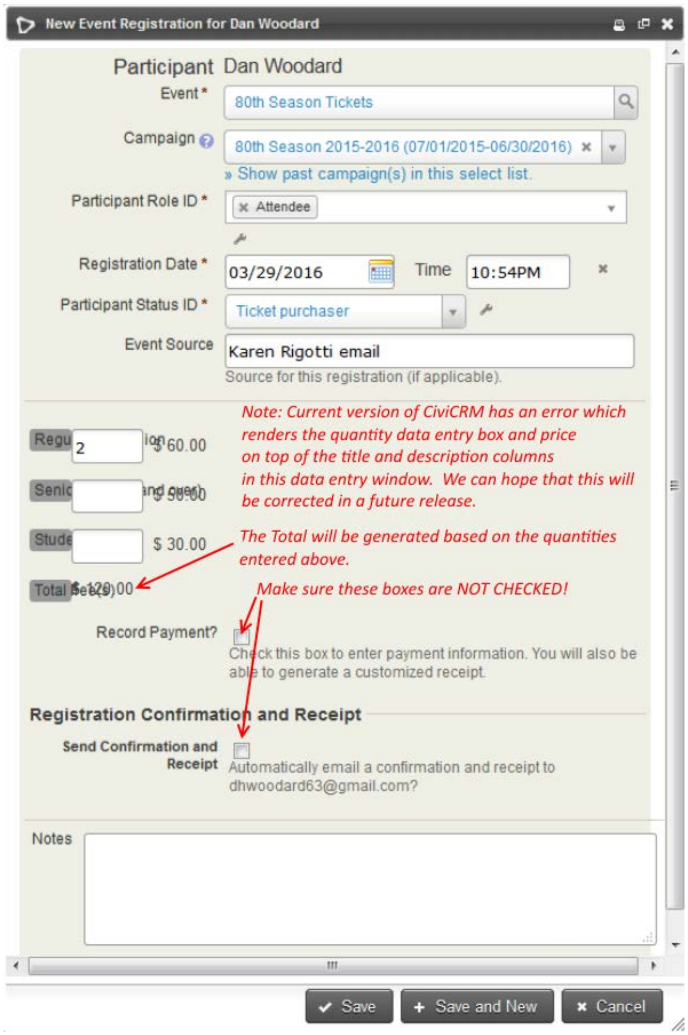
• Enter the **Participant Status ID** of ***Ticket Purchaser***.

• Enter the **Event Source** of ***PayPal***.

• Enter the number of tickets of each type purchased in the appropriate boxes. The **Total Fee(s)** should match the PayPal payment total.

• Do *not* select the **Record Payment** or **Send Confirmation** boxes. Click **Save**.

Illustrations: CiviCRM (Ticket Sales)



If you don't get a notification box that the registration has been saved, you may have neglected to enter a required (*) field.

Notes

2. *Ticket Purchase by check, notification via email*

• From the **View Contact** screen for the ticket purchaser, select the **Events** tab.

• Select "Add Event Registration"

• Select the **Event** (either the concert name or *NNth Season Tickets*). The associated **Campaign** (NSCS season) should automatically appear.

• Allow the **Participant Role ID** to default to ***Attendee***.

• Enter the sent date and time on the email as the **Registration Date** and **Time**.

• Enter the **Participant Status ID** of ***Ticket Purchaser***.

• Enter the **Event Source** of ***[Name] email*** (who sent the email).

• If known, enter the number of tickets of each type purchased in the appropriate boxes. The **Total Fee(s)** should match the PayPal payment total. If the email does not specify the quantity/type of tickets, leave the boxes blank.

• Do <u>not</u> select the **Record Payment** or **Send Confirmation** boxes. Click **Save**.